United Nations
Economic Commission for Europe

Food and Agriculture Organization
of the United Nations

ECE/TIM/INF/4

TIMBER AND FOREST INFORMATION SERIES

# TIMBER COMMITTEE YEARBOOK

# 1997

UNITED NATIONS

ECE/TIM/INF/4

United Nations Economic Commission for Europe
Food and Agriculture Organization
of the United Nations

Timber Section,
Geneva, Switzerland

**TIMBER AND FOREST INFORMATION SERIES**

# TIMBER COMMITTEE YEARBOOK

# 1997

**UNITED NATIONS**
**New York and Geneva, 1997**

# UN/ECE TIMBER COMMITTEE YEARBOOK 1997

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## PREFACE

The *Yearbook* is intended to disseminate the information on the Timber Committee's activities among those for whom it would be most useful - experts in the fields under consideration. The aim is twofold: to provide an overview of the Committee's activities; and to provide bibliographical references, so that interested experts may obtain the necessary documents as quickly and easily as possible. The *Yearbook* can not be an exhaustive account of all the Committee's activities, which are set out in the Committee's formal report and associated documents.

Information about the publications or any other aspect of the Committee's work may be obtained by writing to the secretariat:

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# I. THE TIMBER COMMITTEE'S ACTIVITIES IN 1996

## 1. Promotion of sustainable forest management in the region

The major overall goal of both the Timber Committee and the European Forestry Commission is the promotion of sustainable forestry in the region, and all parts of the programme should contribute to this goal. In particular the Committee and the Commission's operations to collect and validate data, notably on the forest resource (see section 4 of this Yearbook), to review markets (section 6) and to analyse the outlook for the balance between supply and demand for wood (section 3) all provide necessary basic information for an informed policy debate.

The joint session also reviewed, on the basis of national reports, the status of sustainable forestry in the region. The national reports and the ensuing discussions were summarised by the secretariat. This summary, which is still too long for this Yearbook, is contained in the FAO publication "State of the World's Forests 1997" to be issued in spring 1997.

Finally the Committee and the Commission make a direct input to two of the major international political "processes" intended to ensure sustainable forest management: the Intergovernmental Panel on Forests (IPF) at the global level, and at the regional level, the pan-European ministerial process on the protection of forests in Europe. The results of the study of European timber trends and prospects (ETTS V) were presented to the IPF, along with the plans for the Forest Resource Assessment 2000. Both were recognised as important regional inputs to a global process. At the pan-European level, ECE and FAO will collect as much information as possible on indicators of sustainable forest management and present it to the Ministerial Conference scheduled for Lisbon in 1998, alongside countries own reports on the implementation of the resolutions adopted at the Helsinki Conference in 1992. In addition, the Geneva secretariat is monitoring forestry assistance to countries in transition according to Helsinki resolution H3, and preparing annual reports.

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## 2. Joint session of the ECE Timber Committee and the FAO European Forestry Commission

The ECE Timber Committee and the FAO European Forestry Commission were founded together in 1948, at the Conference of Marianske Lazne, and since then have worked very closely. In 1992 it was decided to formally integrate their work programme, in addition to the system of joint subsidiary bodies and joint publications. The ECE and FAO secretariats have also always worked very closely together. From time to time a joint session of the two bodies is held to review strategic directions and discuss matters of common interest. Such a joint session took place in September 1996 in Geneva, with the special aim of considering the policy implications of ETTS V. The highlights of the session are reported elsewhere in this yearbook. At the session the presentation of the integrated programme was considerably streamlined, and a core programme of activities was identified, on monitoring and analysis of sustainable development of the forest and forest sector in the region. Most secretariat resources should be devoted to this core programme. The Committee and the Commission will however continue to provide a forum for international cooperation in other areas, with minimum secretariat input, through the use of decentralised organisation and delegation of responsibility, notably the use of teams of specialists.

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## 3. Fifth European Timber Trends and Prospects Study (ETTS V)

*European Timber Trends and Prospects: into the 21st century* was published in August 1996. It reviews the outlook for supply and demand of roundwood and forest products to 2020, with sections on trade, energy, prices and external influences on the sector, including policies and pollution. In very broad terms, it concludes that demand for forest products will continue to rise, but rather slowly, in any case, more slowly than national income as a whole. European roundwood supply will also rise slowly, while remaining well inside the limits of sustainable wood supply. The contribution of fibre from recycled paper and of imports from other regions will rise faster than the supply of roundwood from European forests. However, the study considers that other regions will have the capacity to supply Europe's needs. In general, prices are not expected to rise. The study is accompanied by a series of "working papers" which provide information on assumptions and methods and country detail which could not be included in the study itself.

The joint session highlighted several aspects, including:

- the need for forest products to remain competitive, on price and performance;
- the need to monitor substitution, between forest products and by non-forest products;
- the need for greatly improved public relations in the sector;
- the use of recovered wood (e.g. demolition waste, used pallets) for energy and for raw material;
- the need to monitor developments in the countries in transition where the degree of uncertainty was particularly great, against the ETTS V forecasts.

Several countries have held national discussions on the implications of ETTS V for their own national policies and outlook, or are translating ETTS V into their own languages, demonstrating that the study addresses fundamental issues of importance to policy makers, but which cannot be addressed only at the national level, in view of the continuing globalisation of forest products markets and of the forest policy debate.

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## 4. Forest Resource Assessment 2000 - Temperate and Boreal Zones

The Temperate and Boreal Forest Resources Assessment 2000 (TBFRA-2000) is becoming the most interesting and challenging project in the Timber Committee's Programme of work for the forthcoming 3-4 years. High expectations have been raised for this work. The global political pressure, and new more ambitious demands for reliable forest resources information, could only be satisfied by including into the Assessment 2000 a wide range of "non-traditional" parameters (e.g. biodiversity, forest condition, carbon sequestration, non-wood goods and services). This makes the TBFRA-2000 much more complicated than the previous resource assessments.

The project is now at an advanced planning stage. Good progress has been made in the preparation of the TBFRA-2000 enquiry since the second meeting of the team of specialists (ToS) held in April 1996 in Geneva. A number of brainstorming meetings, workshops, discussions and consultations on most difficult aspects of the temperate/boreal assessment, which were organized in 1996, built the platform for the elaboration of background documents of the Assessment. An important step in the assessment preparation process was the Global FRA-2000 planning workshop, organized in Washington DC in December 1996.

The TBFRA-2000 is being prepared in such a way that it will also be an effective instrument to collect and make available data to the pan-European process on the protection of forests, on as many indicators of sustainable forest management as possible. The network of national correspondents for the TBFRA-2000 was established at the beginning of 1996 to contribute to the project. The collection and up-dating forest resources information for the "State of the World's Forests 1997" report was the first practical action by country correspondents in mid-1996.

The Expert Consultation on Global FRA-2000 ("Kotka-III" meeting) held in June 1996 proposed the Global Framework for the Assessment. The temperate/boreal FRA enquiry is being built at present on the basis of the proposed Global Framework. The enquiry, including terms and definitions, will be sent for testing to some countries, as proposed at the last session of the Timber Committee (September 1996). After consideration by the ToS in March 1997, the enquiry will be presented to the Joint ECE/FAO Working Party, finalized on the basis of its comments and remarks and sent to countries in fall 1997.

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### 5. Assistance to countries in transition of central and eastern Europe

Progress on the implementation and development of the programme of assistance to countries in transition in the forestry and forest products sector was reported to the Joint ECE Timber Committee and FAO European Forestry Commission session in September 1996.

The second round of the monitoring of implementation of Resolution H3 of the Helsinki Ministerial Conference launched at the end-1995 led to a draft "Interim Report". The ECE regional adviser Mr. P. Csoka presented the report to the meeting of the team of specialists to monitor and develop assistance to countries in transition (April 1996) and to the pan-European Conference for the protection of forests follow-up meeting (May 1996).

The team of specialists reviewed in detail developments in the area of assistance to countries in transition, including H3 implementation, programme of workshops and activities related to human resources development and cooperation with training institutions. The next meeting of the team is scheduled to be held in Slovenia in October 1997.

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### Workshop on institution building, framework conditions and policy infrastructure for the sustainable development of the forestry sector

*Slovakia, 30 June to 4 July 1996*

The workshop stated in particular that the changing conditions and progress in knowledge in the forestry sector required a continued and systematic training and education in the countries in transition (CITs). It was recognized that the Governments should contribute to this with the support, cooperation and participation of non-state forest organizations and the private sector.

The establishment of a reliable forest information system was considered as an important element of the sustainable forest management in CITs. The forest research activities should also contribute to the sustainable development of forest resources. Governments have responsibility to guarantee and support forestry research.

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### Workshop on public relations for countries in transition

*Ossiach, Austria, 13-16 November 1996*

Public relations (PR) is a 2-way communication to promote an image and to bring ideas and developments in the forest and forest industries (FFI) sector, via the media, to the public, to environmental groups, to legislators and throughout the FFI sector. This is one of the messages from the workshop organized by the Joint FAO/ECE Team of Public Relations Specialists in the Forest and Forest Industries Sector and held under the auspices of the ECE Timber Committee

and FAO European Forestry Commission. The workshop, sponsored by the Austrian Federal Ministry for Agriculture and Forestry, was attended by participants and speakers from Albania, Austria, Belarus, Bulgaria, Croatia, Hungary, Latvia, Lithuania, Moldova, Romania, and Slovakia.

The workshop was also an opportunity for a 2-way communication and each country presented a national report with examples of PR messages and materials. In summary, most countries in transition (CITs) had initiated formal PR work at the national level although they often lack infrastructural links with trade associations. Although the needs of CITs are diverse in the FFI sector, information development, including statistics and PR, is an universal requirement.

The period of transition was seen as an opportunity to increase awareness and change traditional thinking about the FFI sector. As PR is a continually improving process, the needs will evolve both internally within government and industry and externally to the public, and especially new private forest land owners. Other groups are emerging, like environmental NGOs and trade associations, and they require specific public relations efforts to address their interests.

Two field trips were conducted in conjunction with the workshop: first to the Austrian Broadcasting studios, and second, to visit the forest farmer who received one of the national awards for model forestry in 1996.

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## 6. Forest products markets

Forest products markets in the ECE region have been marked by extreme swings in 1995 and 1996 as economic conditions changed over the period for countries within the region. Europe in the second half of 1996 showed weak recoveries from a slump beginning in the second half of 1995 and continuing through first half of 1996. 1995's record prices were followed by price collapses, its shortages by oversupply, its high stocks by rapid destocking and its capacity expansions by production limitations. Large forest products corporations enhanced their positions with additional mergers.

The United States housing market recovered in 1996, and with the addition of a stronger Canadian housing market in 1996, consumption levels rose. Strong export markets in the Pacific Rim counterbalanced decreased demand in Europe for sawnwood and paper.

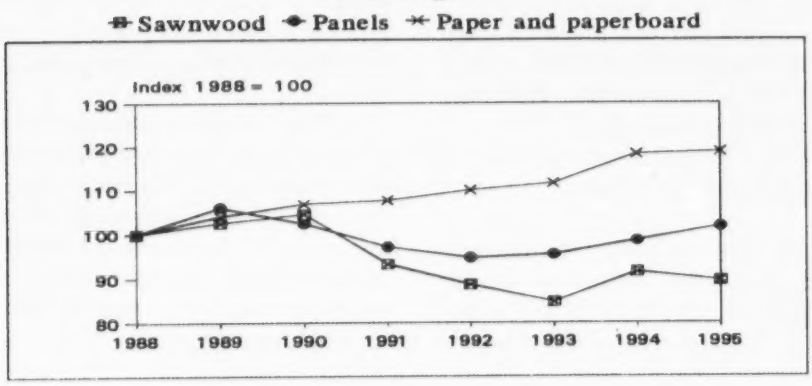
In countries in transition, the general recovery from the deep recession of the early 1990s continues with the notable exception of Russia. Overall Russian export values for pulp and paper improved in 1995, but production of most forest products fell again in 1996. The forecasts for 1997 show optimism that the bottom has been reached in the Russian Federation.

In Europe, consumption of forest products is forecast by the Timber Committee to recover slightly, while the present market conditions in North America and the countries in transition (other than Russia as mentioned above) are forecast to remain constant.

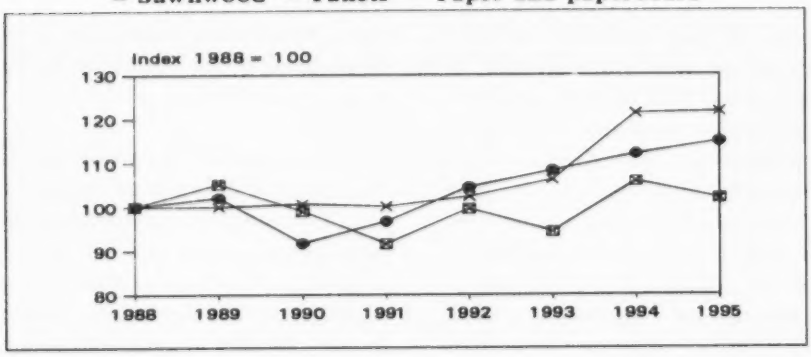
Forest products markets have been marked by the growth and future potential of engineered wood products, like LVL and wooden I-beams, as well as panel products like MDF and OSB. Forecast capacity expansions in some of these products will have to be accompanied by successful market development efforts to offset potential price declines. The wood-based industries are justifiably worried about market substitution by non-wood materials like concrete, aluminum, steel and pvc plastics. They have called upon the Timber Committee for coordinated international promotional efforts to curb the loss of market share.

# Apparent consumption of sawnwood, panels and paper & paperboard 1988 - 1995

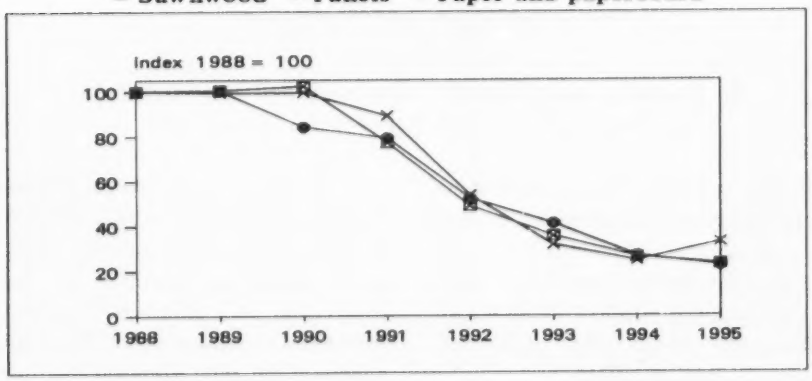
## Europe




## North America




## Russian Federation



## 7. Wood--an environmentally friendly material

*Workshop held in Jönköping, Sweden, 15-17 April 1996*

As wood is an environmentally friendly material, because of its renewability when grown and produced under sustainable forest management principles, and when employed appropriately for its wide range of both products and processes, and when it is finally recycled for the last time or used for energy, it should be pro-actively promoted through coordinated international efforts. This was the principal conclusion from the workshop held in conjunction with the Elmia Trade Fair.

Sponsored by the Swedish Ministry of Industry and Commerce, the National Board of Forestry and a number of Swedish forest and forest try organizations, the workshop consisted of expert presentations and discussions among over 70 people from 16 countries, including 8 countries in transition. Ten specific recommendations were brought to the attention of the Timber Committee in September which then delegated them for action by the Team of Public Relations Specialists.

The workshop participants visited a forest where they spoke with a private forest landowner and representatives of a landowners' association and a sawmillers' association about forest management, environmental considerations, forest economics and forest products markets. They also visited an integrated sawmill, window and prefabricated housing manufacturer.

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## 8. Forest Technology, Management and Training

The Joint FAO/ECE/ILO Committee on Forest Technology, Management and Training held its biennial session in Sinaia, Romania in June 1996. The Committee agreed to continue to promote sustainable forest management through its work. It noted its comparative advantage of a long experience in international cooperation by translating policy and research into operational practice. A team of specialists was set up to analyse social aspects of sustainable forest management, including human resources requirements, employment, training, and safety in forest work. The results would be used as an input for the possible formulation of a resolution on social aspects to be tabled at the third Ministerial Conference on the Protection of Forests in Europe in Lisbon in 1998.

Two special topics were presented: forestry in Romania and information systems in forestry. The Joint Committee reviewed recent achievements and developments in its field of interest and prepared proposals for its programme of work, including notably multiple use forestry, forest fires, safety in forestry, forestry in areas contaminated by radiation, and reducing the impact of forest operations on ecosystems.

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## 9. Environmentally friendly forest roads and wood transport

*Seminar held in Sinaia, Romania 17-22 June 1996*

The aim of the seminar was to exchange information and experience in road planning, design and location; construction techniques and maintenance; forest engineering structures and protective works; and wood transport. These broad topics were discussed under the light of environmentally sound forest practices.

In order to guarantee sustainable forestry in the long-term forest strategy countries will continue to plan, build and maintain forest road networks, while satisfying demand for wood production, protection, and other environmental, social and recreation requirements. This can be achieved by encouraging the adoption of suitable codes of practice which favour multi disciplinary training in

wood technology, environmentally sound planning, road construction methods as well as ecological, economic and social factors.

The seminar also addressed detailed recommendations to the Joint Committee, to member countries and to research organizations and IUFRO.

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### 10. Forest, fire and global change

*Seminar held in Shushenskoe, Russian Federation, 4-10 August 1996*

Both anthropogenic and natural fires are an important phenomenon in all vegetation zones of the globe. Their impacts, however, are not uniform. Fires may lead to the temporary damage of forest ecosystems, to long-term site degradation and to alteration of hydrological regimes which may have detrimental impacts on economies, human health and safety.

As a consequence of global population growth and land-use changes, the cumulative effects of anthropogenic disturbances, and the over-use of vegetation resources, many forest types, which over evolutionary time periods became adapted to fire, are now becoming more vulnerable to fire. On the other hand, in many vegetation types, of the temperate, boreal and tropical ecosystems, fire plays a central role in maintaining the natural dynamics, biodiversity, carrying capacity and productivity of these ecosystems. In many parts of the world sustainable forestry and agricultural practices as well as pastoralism depend on the use of fire.

Vegetation fires produce gaseous and particle emissions that have significant impacts on the composition and functioning of the global atmosphere. These emissions interact with those from fossil fuel burning and other technological sources which are the major cause for anthropogenic climate forcing. The seminar stated the need for a global statistical fire database, by which the economic and ecological impact of fires could be spatially and temporally quantified. Such a reliable database is essential, under current global change conditions, to serve sustainable development and the urgent needs of fire management agencies, policy makers, international initiatives, and the scientific community.

As climate change is a virtual reality, with predicted significant impacts at northern latitudes, seminar participants recognized that boreal and temperate zone fire activity will increase significantly in the future, with resulting impacts on biodiversity, forest age-class distribution, forest migration, sustainability, and the terrestrial carbon budget. It is essential that future fire regimes in these regions be accurately predicted, so informed fire management decisions can be made.

Seminar participants recognized that, although the global fire science community had made considerable progress to investigate global impacts of fire, using available and developing new technologies, no international mechanisms existed for systematically collecting, evaluating and sharing global fire information. There were also no established mechanisms at the international level to provide fire disaster management, support and relief.

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### 11. Safety and health in forestry are feasible

*Seminar held in Emmental, Switzerland 7-11 October 1996*

In spite of intensive efforts in prevention, trends in forestry accidents and occupational health statistics showed, in most countries, no signs of improvement. The main emphasis of the seminar was not the analysis of the many problems, but to seek successful approaches to solving them. These include: training, skill certification, management involvement, safety regulations and codes of practice, and integrated safety programmes involving all forestry stakeholders.

The seminar demonstrated that the implementation of certain measures could lead to safety in forestry by reducing the frequency and severity of accidents. Many earlier efforts had failed or had limited impact because they focused only on technical measures and work execution. Integrated approaches that deal with safety and health as an integral part of company objectives and of global quality management have been far more successful. These approaches involve all levels of personnel in an enterprise, starting with management. Occupational safety and health is a management responsibility which requires incentives, rewards and sanctions, so as to enhance motivation. Training is an essential element to raise awareness and to define safety and health objectives.

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## 12. Public relations in forestry

In 1996, the Joint FAO/ECE Team of Public Relations Specialists in the Forest and Forest Industries Sector conducted a workshop for countries in transition in Austria (see section 5. above). The Team initiated follow-up on the European timber trends study (ETTS V) and produced a poster for the 1996 FAO World Food Summit.

The team had its mandate extended another two years in order to achieve the overall goal of creating a positive image of the sector by promoting key common public relations concepts and activities in the member countries. The team has: published a public relations (PR) toolkit titled, "Communications strategies in forestry and the forest industries sector"; established a network of PR specialists; and provided PR on some Timber Committee and FAO European Forestry Commission outputs.

In 1997 the team will publish country fact sheets, seek to extend their network to include more Mediterranean countries, increase PR activities concerning certification of sustainable forest management, provide follow-up to the recommendations from 1996 workshops, and report on the campaigns of substitute materials like concrete, steel and plastic. In 1998 they will conduct an international forestry communicators forum.

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## 13. Policy issues in timber markets, recycling and energy generation from wood

*Workshop held in Hamburg, Germany, 3-5 September 1996.*

The workshop called the Timber Committee to:

* Promote the establishment of a cooperative program among ECE member countries to increase the market shares of wood products and to promote the advantages of wood as a renewable energy source;

* Develop uniform definitions and a statistical information system for grades of "wood residues," "wood waste" and "recovered paper";

* Identify topics for study at the international level on environmental impacts for wood products, recovered wood and fibre, including their reuse as fuel, and causes of price fluctuations in the recovered paper and primary pulp markets;

* Support the ECE's efforts in following emission and pollutant depositions and to work for continuous improvements because emissions affecting forests are likely to have an effect on timber availability and quality.

These were the main recommendations that came from a list of conclusions to this workshop organized by two teams of specialists: Wood and Energy and New Products, Recycling, Markets and Applications of Forest Products. Three divisions of the ECE were also involved in the workshop

planning: Timber Section, Trade Division; Energy Division; and Environment and Human Settlements Division. The workshop was held at the German Federal Research Centre for Forestry and Forest Products and the University of Hamburg, Department of Forestry, Wood Biology and Wood Technology. The workshop was sponsored by the German Federal Ministry of Food, Agriculture and Forestry, the Federal Research Centre and the University of Hamburg.

Nine countries were represented by approximately 30 participants and speakers. Following a keynote address which challenged the participants to consider the interactions of policies, markets, recycling and energy from wood in an environmental context, regional and technical presentations were heard. Group discussions on these same subjects led to conclusions and recommendations which the Timber Committee has delegated to the Team of Public Relations Specialists and to a newly established Team of Specialists on Recycling, Energy and Market Interactions. A study tour included a recycled paper and paperboard manufacturer, a waste wood recycling centre, and one of the largest municipal waste energy cogeneration plants.

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### 14. Status of women in forestry

The joint session had a special topic on this subject, based on presentations by experts from Norway and Sweden. The proportion of women in forestry is small although it has increased significantly in the last decade. Remuneration for equivalent positions and qualifications is lower for women than for men. Several countries reported awareness of the problem, and measures to improve the status of women in forestry, through stimulating interest, removing obstacles, providing training and information, "networking" etc. However, it is clear that much remains to be done before the status of women is equal to that of men in the forest sector.

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## II. ACTIVITIES PLANNED FOR 1997 AND 1998

This section is intended to provide readers with information on the Committee's forthcoming activities. It is not a definitive programme, as additions or deletions sometimes have to be made at fairly short notice. Meetings are formally announced by the circulation of a provisional agenda at least three months before their scheduled date, and a press release is also issued.

Attendance at seminars, symposia and study tours organized by the Committee is open to experts in the subjects to be discussed, with permission of their Governments. Further information about all this activities is available on request from the secretariat.

### The Timber Committee's annual session

The Timber Committee meets annually in Geneva: its 1997 session is provisionally scheduled from 6-9 October. The main items on the agenda are: support to UNCED and the pan-European process on the Protection of Forests; the forest resource assessment 2000, temperate and boreal zones; review of recent developments and prospects in the coming year in the forest products markets; review of activities of its subsidiary bodies and of meetings held over the previous year under its auspices.

### Timber Committee study tour on the forest and forest industry sector in the Baltic States

At the invitation of the Estonian Forest Department, the Latvian State Forest Service and the Lithuanian Ministry of Forestry a study tour will be held from 4-9 May 1997 on the theme of "the forest and forest industry sector in the Baltic Countries." The week-long tour will depart from Tallinn (Estonia) and move south, finishing in Vilnius (Lithuania). It will cover both typical and new forest products manufacturing operations. Visits to forests to see management practices will also be included. Presentations by experts in each country will give a broad perspective of the state of the sector and provide opportunities for discussions. As the Baltic countries are an emerging force on the European sawn softwood markets, trade opportunities and problems will be a focus. The unique cultural aspects of each country will be presented along the way.

Participation in the study tour will be open to representatives of the Timber Committee as well as representatives related to the forest and forest industries sector from member countries of the UN/ECE and other member countries of the United Nations. The number of participants will be limited to 50 for logistical reasons.

A detailed information note including a registration form can be obtained on request from the secretariat (see address on page iv).

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### Statistics

The Committee will continue to publish its regular statistics in the *Timber Bulletin*, on forest products production and trade, trade flows of forest products, the monthly prices for forest products, and the results of the annual enquiry on forest fire.

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**Forest products markets**

Other issues of the *Timber Bulletin* will contain the Committee's regular review and analyses of short-term developments in forest products markets. The annual forest products market review covers trends in the previous year and is published in July/August. The results of the Committee's discussions at its annual session, when it prepares forecasts for the current and forthcoming year, are issued in November.

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**Forest technology management and training**

The Joint FAO/ECE/ILO Committee and its Steering Committee meet in alternate years. The Steering Committee will hold its thirteenth session from 2-3 June 1997 in Jönköping, Sweden in conjunction with the workshop on biodiversity in managed forests, concepts and solutions. The Joint Committee will hold its twenty-second session most probably in June 1998 in Slovakia, in conjunction with the seminar on improving working conditions and productivity in forestry in countries in transition. The following seminars and workshops will be organized in 1997 and 1998 under the auspices of the Joint Committee:

**1997**

| | |
|---|---|
| Title: | **Workshop on biodiversity in managed forests, concepts and solutions** |
| Date: | 4-5 June |
| Location: | Jönköping, Sweden |
| Objectives: | To bring together foresters and Government organizations to discuss the implementation of forest policies. The objective is practices for multiple use forestry, management methods which combine production and biodiversity. The workshop will be held in conjunction with a scientific conference, study visits and the ELMIA WOOD 97 forestry fair. |
| Target groups: | Government agencies, forest managers |

| | |
|---|---|
| Title: | **Workshop in new trends in thinnings** |
| Date: | 8-12 September |
| Location: | Zvolen (Slovakia) |
| Objectives: | To discuss the substantial work on thinning methods and equipment carried out by the Zvolen Forest Research Institute. The workshop will also exchange information and experience on modern thinning concepts for spruce, pine, beech; harvesting systems for sawlogs, industrial wood and wood for energy. Particular emphasis will be attached to cost and environmental aspects and to ergonomics, safety and training. |
| Target groups: | Government agencies, forest managers |

**1998**

| | |
|---|---|
| Title: | **Seminar on training of contractors, supervisors and operators of harvesters and small forest owners** |
| Date: | April, dates to be confirmed |
| Location: | France |
| Objectives: | To seek successful approaches in vocational training practices by exchanging experiences in member countries, with the view of increasing professional qualifications of self employed and small contractors and operators, while controlling production costs. |
| Target groups: | Government agencies, forest workers' training institutions, small forest owners, harvesting operators |

| | |
|---|---|
| Title: | **Seminar on improving working conditions and productivity in forestry in countries in transition** |
| Date: | June, dates to be confirmed |
| Location: | Slovakia |
| Objectives: | West - East exchange of information on the close relationship between satisfactory levels of productivity and adequate working conditions. Discussion of cases which convincingly demonstrate that investments in a skilled and motivated workforce are indispensable for carrying out forest operations efficiently and profitably. The seminar will enhance the ability of governments and the private sector to integrate modern concepts of productivity and working conditions. These questions are of particular relevance for the countries in transition in order to ensure that restructuring and privatisation results in economic and social sustainability. |
| Target groups: | Forest managers, contractors, representatives of employers' organizations (including contractors' organisations) and workers' organisations. |

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**Forest Economics and Statistics**

The FAO/ECE Working Party on Forest Economics and Statistics meets every two years. It will hold its twenty-first session in Geneva from 21-23 May 1997. It will evaluate the ETTS V process, review preparations for the next enquiry on the forest resource of the temperate zones, review the international forest sector statistical system and inter-organisation cooperation, and will adopt its programme of work for 1998-2003.

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**Assistance to countries in transition of central and eastern Europe**

At its annual sessions the Committee reviews its programme of assistance to countries in transition on the basis of recommendations of the team of specialists, which will meet in autumn 1997 in Slovenia, to ensure that it fulfils the expectations of this group of countries. The programme consists mainly in the organization of workshops, the following is scheduled:

- Workshop on developing marketing of sawnwood products in countries in transition to market economies, Arkangelsk, Russian Federation November 1997;

Country profiles on transition countries of central and eastern Europe will continue to be published.

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**Outlook for the supply and demand of non-wood goods and services**

A study on the outlook for the supply and demand of the non-wood goods and services of the forest will be prepared, as a framework for national studies, as a basis for national policies, and to develop methodology in the field. It will be based on case studies.

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## III. BIBLIOGRAPHICAL REFERENCES

The Timber Committee publications (other than reports and associated documents) have been organized since 1994, into the following five series:

| | |
|---|---|
| *Timber Bulletin* | ECE/TIM/BULL/../.. |
| Timber and Forest Study Papers | ECE/TIM/SP/.. |
| Timber and Forest Discussion Papers | ECE/TIM/DP/.. |
| Timber and Forest Information Series | ECE/TIM/INF/.. |
| Timber and Forest Seminar and Workshop Proceedings | none |

The Committee publishes the ***Timber Bulletin***, which provides regularly, detailed information on the forest products sector: statistics on production, removals, trade (total and by origin and destination), prices; the results of an annual survey on forest fires; analyses of market developments and prospects for the coming year. The contents of the *Timber Bulletin* in 1996 is set out in the bibliography.

The **Timber and Forest Study Papers**, formerly publications in the ECE/TIM series, are composed of the European Timber Trends and Prospects Study (ETTS V), Forest and Forest Products Country Profiles, Forest Resource Assessment publications, medium-term surveys of the structure and capacity of the wood-based panels and sawmilling industries, and other special studies. The **Timber and Forest Discussion Papers** are intended to be a means of distributing current topical information in the forest and forest industries sector which might or might not become part of a more comprehensive study at some later time. Unlike the *Timber Bulletin* and the **Study Papers**, the **Discussion Papers** have limited input from the secretariat and are published in their original language. **Timber and Forest Seminar and Workshop Proceedings** are not published by the secretariat, but by the host country of such activities, this explains why there is no identification code. The last series is the **Timber and Forest Information Series** which consists of this *Timber Committee Yearbook*, plus *Facts about ...*, which presents background information and activities of the Committee and its two subsidiary bodies. A complete list of publications appears at the back of this *Yearbook*.

Set out below are bibliographical references to those documents issued under the Committee's auspices in 1996 which may be of interest to experts in the forest and forest products sector.

Issues of the Timber Bulletin are available on subscription (see below). Unless otherwise indicated, other documents are available on request, free of charge from the secretariat, while stocks last. The documents are described under the same headings as the text of the *Yearbook*. Further information may be obtained from the ECE/FAO secretariat (address on page iv).

### 1. PROMOTION OF SUSTAINABLE FOREST MANAGEMENT IN THE REGION

Reports to the joint session of the ECE Timber Committee and the FAO European Forestry Commission (TIM/R.275 ; FO:EFC/96/11 and TIM/R.276 ; FO:EFC/96/12)
Report of the joint session of the ECE Timber Committee and the FAO European Forestry Commission (ECE/TIM/87)

### 2. JOINT SESSION OF THE ECE TIMBER COMMITTEE AND THE FAO EUROPEAN FORESTRY COMMISSION

Report of the joint session of the ECE Timber Committee and the FAO European Forestry Commission (ECE/TIM/87)

### 3. FIFTH EUROPEAN TIMBER TENDS AND PROSPECTS STUDY (ETTS V)

European Timber Trends and Prospects: into the 21st century (ETTS V), ( ECE/TIM/SP/11)

## 4. FOREST RESOURCE ASSESSMENT 2000 - TEMPERATE AND BOREAL ZONES

Report to the joint session of the ECE Timber Committee and the FAO European Forestry Commission (TIM/R.278 ; FO:EFC/96/14)

## 5. ASSISTANCE TO COUNTRIES IN TRANSITION OF CENTRAL AND EASTERN EUROPE

Report to the joint session of the ECE Timber Committee and the FAO European Forestry Commission (TIM/R.277 ; FO:EFC/96/13)

**Reports of the workshops organized in 1996:**

Institution building, framework conditions and policy infrastructure for the sustainable development of the forestry sector, Slovakia, 30 June to 4 July 1996, the proceedings are being prepared by the host country

Public relations for countries in transition, Ossiach, Austria, 13-16 November 1996, the report of the workshop will be presented to the Timber Committee's session in 1997

**Forest and forest products country profiles**

Forest and forest products country profiles have published for the following countries in transition:

| | |
|---|---|
| former Czech and Slovak Federal Republic | (ECE/TIM/64) |
| Romania | (ECE/TIM/65) |
| Hungary | (ECE/TIM/66) |
| Poland | (ECE/TIM/67) |
| Albania | (ECE/TIM/73) |
| Estonia | (ECE/TIM/74) |
| Bulgaria | (ECE/TIM/SP/1) |
| Slovenia | (ECE/TIM/SP/2) |
| Lithuania | (ECE/TIM/SP/3) |
| Ukraine | (ECE/TIM/SP/4) |
| Belarus | (ECE/TIM/SP/5) |
| Republic of Armenia | (ECE/TIM/SP/8) |

## 6. FOREST PRODUCTS MARKETS

The *Timber Bulletin* consists of 6 issues a year and is available on an annual subscription. For further information, those interested are invited to contact the United Nations Sales and Marketing Section, Palais des Nations, 1211 Geneva 10, Switzerland (Fax N°: + 41 22 917 00 27).

The contents of the *Timber Bulletin* in 1995, Vol. XLIX, was as follows:

| Issue: | Title: |
|---|---|
| ECE/TIM/BULL/49/1 | Forest Products Prices, 1993-1995 |
| ECE/TIM/BULL/49/2 | Forest Products Statistics, 1991-1995 |
| ECE/TIM/BULL/49/3 | Forest Products Annual Market Review, 1995-1996 |
| ECE/TIM/BULL/49/4 | Forest Fire Statistics, 1993-1995 |
| ECE/TIM/BULL/49/5 | Forest Products Trade Flow Data, 1994-1995 |
| ECE/TIM/BULL/49/6 | Forest Products Markets in 1996 and Prospects for 1997 |

**Relevant FAO Statistical publications**

(available from: Distribution and Sales Section, Food and Agriculture Organization of the United Nations, Via delle Terme di Caracalla, I-00100 Rome)

FAO Yearbook of Forest Products 1994
State of the World's Forests 1997

**7. WOOD AN ENVIRONMENTALLY FRIENDLY MATERIAL**

Report of the Timber Committee workshop on wood--an environmentally friendly material, Jönköping, Sweden, 15-17 April 1996, (TIM/R.281 ; FO:EFC/96/7). The proceedings (English) were published by the host country.

**8. FOREST TECHNOLOGY MANAGEMENT AND TRAINING**

Report of the twenty-first session of the Joint FAO/ECE/ILO Committee on Forest Technology, Management and Training, Sinaia, Romania 24-27 June 1996, (TIM/EFC/WP.1/26).

**9. ENVIRONMENTALLY FRIENDLY FOREST ROADS AND WOOD TRANSPORT**

Report of the seminar on environmentally friendly forest roads and wood transport, Sinaia, Romania 17-22 June 1996, (TIM/EFC/WP.1/SEM.43/2). The proceedings are being prepared by FAO.

**10. FOREST, FIRE AND GLOBAL CHANGE**

Report of the seminar on forest, fires and global change, Shushenskoe, Russian Federation 4-10 August 1996 (TIM/EFC/WP.1/SEM.44/2). The proceedings are being prepared by the team of specialists on forest fire.

Forest Fire Statistics, 1993-1995, ECE/TIM/BULL/49/4

International Forest Fire News, (N° 14, January 1996)
International Forest Fire News, (N° 15, September 1996)

**11. SAFETY AND HEALTH IN FORESTRY ARE FEASIBLE**

Report of the seminar on safety and health in forestry are feasible, Emmental, Switzerland 7-11 October 1996 (TIM/EFC/WP.1/SEM.45/2). The proceedings are being prepared by the host country.

**12. PUBLIC RELATIONS IN FORESTRY**

Report of the meeting of the joint FAO/ECE team of public relations specialists in the forest and forest industries sector, Gmunden, Austria 1-4 July 1996, (TIM/R.280 ; FO:EFC/96/16)

**13. POLICY ISSUES IN TIMBER MARKETS, RECYCLING AND ENERGY GENERATION FROM WOOD**

Report of the workshop on policy issues in timber markets, recycling and energy generation from wood, Hamburg, Germany 3-5 September 1996, (TIM/R.281/Add.3 : FO:EFC/96/17/Add.3). The proceedings are being prepared by the host country.

**14. STATUS OF WOMEN IN FORESTRY**

Status of women in forestry, copies of the presentation by Ms. A. Egeland (Norway) may be obtained on request from the secretariat.

## IV. LIST OF MEETINGS IN 1997 AND 1998

Note: The meetings are sub-divided into two categories: meetings marked (A) are open to delegates or approved representatives from all member countries of ECE as well as from other member countries of the United Nations and organizations accredited to ECE (or to FAO and ILO, in the case of meetings co-sponsored by them), while meetings marked (B) are those restricted to the countries or individuals nominated by their countries to take part in the activity concerned, e.g. a team of specialists.

### 1997

| Date | Location | Title |
|---|---|---|
| 22-23 April | Geneva | Meeting of the Timber Committee office holders and the EFC Executive Committee (B) |
| 4-10 May | Baltic countries | Timber Committee Study tour on the forest and forest industries sector (A) |
| 21-23 May | Geneva | Joint FAO/ECE Working Party on Forest Economics and Statistics, twenty-first session (A) |
| 2-3 June | Jönköping (Sweden) | Steering Committee of the Joint ECE/FAO/ILO Joint Committee on Forest Technology, Management and Training, thirteenth session (B) |
| 4-5 June | Jönköping (Sweden) | Workshop on biodiversity in managed forests, concepts and solutions (A) |
| 8-12 September | Zvolen (Slovakia) | Workshop in new trends in thinnings (B) |
| 6-9 October | Geneva | ECE TIMBER COMMITTEE, fifty-fifth session (A) |
| 17-19 November | Geneva | *Ad hoc* meeting on temperate and boreal forest resource assessment (A) |
| November (dates to be confirmed) | Arkangelsk (Russian Federation) | Workshop on developing marketing of sawnwood products in countries in transition to market economies (B) |
| Undecided | Czech Republic | Workshop on certification issues for countries in transition (B) |

## 1998

| Date | Location | Title |
|---|---|---|
| April (dates to be confirmed) | Geneva | Meeting of the Timber Committee office holders and the EFC Executive Committee(B) |
| April (dates to be confirmed) | France | Seminar on training of contractors, supervisors and operators of harvesters and small forest owners (A) |
| summer (dates to be confirmed) | Slovakia | Joint FAO/ECE/ILO Committee on Forest Technology, Management and Training, twenty-second session (A) |
| summer (dates to be confirmed) | Slovakia | Seminar on improving working conditions and productivity in forestry in countries in transition (A) |
| 5-8 October | Geneva | ECE TIMBER COMMITTEE, fifty-sixth session (A) |
| Undecided | Italy (to be confirmed) | Seminar on harvesting of wood and non-wood forest products in the Mediterranean region (A) |

## SOME FACTS ABOUT THE TIMBER COMMITTEE

The Timber Committee is a principal subsidiary body of the ECE (UN Economic Commission for Europe) based in Geneva. It constitutes a forum for cooperation and consultation between member countries on forestry, forest industry and forest product matters. All countries of Europe; the former USSR; United States of America, Canada and Israel are members of the ECE and participate in its work.

The ECE Timber Committee shall, within the context of sustainable development, provide member countries with the information and services needed for policy- and decision-making regarding their forest and forest industry sector ("the sector"), including the trade and use of forest products and, when appropriate, formulate recommendations addressed to member Governments and interested organizations. To this end, it shall:

1. With the active participation of member countries, undertake short-, medium- and long-term analyses of developments in, and having an impact on, the sector, including those offering possibilities for the facilitation of international trade and for enhancing the protection of the environment;

2. In support of these analyses, collect, store and disseminate statistics relating to the sector, and carry out activities to improve their quality and comparability;

3. Provide the framework for cooperation e.g. by organizing seminars, workshops and *ad hoc* meetings and setting up time-limited *ad hoc* groups, for the exchange of economic, environmental and technical information between governments and other institutions of member countries that is needed for the development and implementation of policies leading to the sustainable development of the sector and to the protection of the environment in their respective countries;

4. Carry out tasks identified by the UN/ECE or the Timber Committee as being of priority, including the facilitation of subregional cooperation and activities in support of the economies in transition of central and eastern Europe and of the countries of the region that are developing from an economic point of view;

5. It should also keep under review its structure and priorities and cooperate with other international and intergovernmental organizations active in the sector, and in particular with the FAO (Food and Agriculture Organization) and its European Forestry Commission and with the ILO (International Labour Organisation), in order to ensure complimentarily and to avoid duplication, thereby optimizing the use of resources.

## UN-ECE/FAO Publications

**Timber Bulletin** Volume XLIX (1996) ECE/TIM/BULL/49/...
**Timber Bulletin** Volume L (1997) ECE/TIM/BULL/50/...

1. Forest Products Prices
2. Forest Products Statistics
3. Forest Products Annual Market Review
4. Forest Fire Statistics
5. Forest Products Trade Flow Data
6. Forest Products Markets in *(current year)* and Prospects for *(forthcoming year)*

**Geneva Timber and Forest Study Papers**

| | |
|---|---|
| Forest and Forest Products Country Profile: Republic of Armenia | ECE/TIM/SP/8 |
| (Country profiles also exist on Albania, Belarus, Bulgaria, former Czech and Slovak Federal Republic, Estonia, Hungary, Lithuania, Poland, Romania, Slovenia and Ukraine) | |
| North American timber trends study | ECE/TIM/SP/9 |
| Long-term historical changes in the forest resource | ECE/TIM/SP/10 |
| European Timber Trends and Prospects: into the 21st century (ETTS V) | ECE/TIM/SP/11 |

***The above series of sales publications and subscriptions are available through national agents and booksellers, or through:***

Sales and Marketing Section, Room C-115
United Nations
Palais des Nations
CH-1211 Geneva 10, Switzerland
Fax: + 41 22 917 0027

* * * * *

**Geneva Timber and Forest Discussion Papers** *(original language only)*

| | |
|---|---|
| Manual on acute forest damage | ECE/TIM/DP/7 |
| *ETTS V working papers:* | |
| Pajuoja,"The outlook for the European forest resources and roundwood supply" | ECE/TIM/DP/4 |
| Brooks, Baudin and Schwarzbauer, "Modeling forest products demand, supply and trade" | ECE/TIM/DP/5 |
| Baudin and Brooks, "Projections of forest products demand, supply and trade in ETTS V" | ECE/TIM/DP/6 |
| Eronen, "Forest resources and consumption of forest products in countries in transition, 1990-2020" | ECE/TIM/DP/8 |
| Issartel and Vikinge, "Price trends for forest products, 1964-1991" | ECE/TIM/DP/9 |
| European forests and timber: Scenarios into the 21st century *(sold with ECE/TIM/SP/11)* | ECE/TIM/DP/10 |
| Peck and Descargues, "The policy context for the development of the forest and forest industries sector in Europe" *(to be published in 1997)* | ECE/TIM/DP/11 |

**Seminar and Workshop Proceedings**

- Seminar on "Exploring multiple use and ecosystem management: from policy to operational practice", Prince George, Canada, September 1995

**International Forest Fire News** *(two issues per year)*

**Timber and Forest Information Series**

| | |
|---|---|
| Timber Committee Yearbook 1997 | ECE/TIM/INF/4 |

***The above series of publications may be requested free of charge through:***

Timber Section
UN/ECE Trade Division
United Nations
Palais des Nations
CH-1211 Geneva 10, Switzerland
Fax: + 41 22 917 0041

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